



# Aberdeen Rapid Transit

Detailed Options Appraisal

Technical Note J - Market Research

On behalf of:

The logo for nestrans features the word "nestrans" in a white, lowercase, sans-serif font, centered within a solid blue rectangular background.

nestrans

Project Ref: 330610570 | Rev: A | Date: February 2023

---

Registered Office: Buckingham Court Kingsmead Business Park, London Road, High Wycombe, Buckinghamshire, HP11 1JU  
Office Address: 3rd Floor, Randolph House, 4 Charlotte Ln, Edinburgh EH2 4QZ  
T: 0131 297 7010 E: info.edinburgh@stantec.com

## Document Control Sheet

**Project Name:** Aberdeen Rapid Transit

**Project Ref:** 330610570

**Report Title:** Technical Note J

**Date:** February 2023

	Name	Position	Signature	Date
<b>Prepared by:</b>	Euan Lloyd	Graduate Transport Planner	EL	15/02/23
	Emma Schneider	Principal Transport Planner	ES	
<b>Reviewed by:</b>	Emily Seaman	Senior Associate	ES	15/02/23
<b>Approved by:</b>	Scott Leitham	Director, Transport Planning	SL	15/02/23
<b>For and on behalf of Stantec UK Limited</b>				

Revision	Date	Description	Prepared	Reviewed	Approved

This report has been prepared by Stantec UK Limited ('Stantec') on behalf of its client to whom this report is addressed ('Client') in connection with the project described in this report and takes into account the Client's particular instructions and requirements. This report was prepared in accordance with the professional services appointment under which Stantec was appointed by its Client. This report is not intended for and should not be relied on by any third party (i.e., parties other than the Client). Stantec accepts no duty or responsibility (including in negligence) to any party other than the Client and disclaims all liability of any nature whatsoever to any such party in respect of this report.

# Contents

- 1 Market Research..... 5**
- 1.1 Overview..... 5
- 1.2 Where do you live? ..... 5
- 1.3 How often do you generally travel to/from or within Aberdeen? ..... 6
- 1.4 How happy are you with the existing bus network? ..... 8
- 1.5 How likely are you to switch to using ART services? ..... 12
- 1.6 Would you be willing...? ..... 14
- 1.7 In general, do you feel that ART would be good for Aberdeen? ..... 16
- 1.8 Why do you think ART would be good for Aberdeen? ..... 16
- 1.9 What is the main reason you think ART would not be good for Aberdeen? ..... 17
- 1.10 Open Question ..... 18
- 1.11 Demographics ..... 18

## Figures

- Figure 1.1: Panel survey respondents home postcode districts..... 6
- Figure 1.2: Frequency of travel to/from/in Aberdeen..... 6
- Figure 1.3: Aberdeen City transport modes ..... 7
- Figure 1.4: Aberdeenshire transport modes..... 7
- Figure 1.5: Parking difficulty ..... 8
- Figure 1.6: Satisfaction with existing bus service offering (Score out of 5)..... 9
- Figure 1.7: Likelihood of behaviour changes based on service improvements (Score out of five) ..... 11
- Figure 1.8: Likelihood of behaviour change ..... 13
- Figure 1.9: Likelihood of behaviour change of these near Portlethen..... 13
- Figure 1.10: Respondents who would choose to use P&R or bus ..... 14
- Figure 1.11: Would you travel further for a comfortable environment? ..... 14
- Figure 1.12: Would you be willing to walk further for a faster bus? ..... 15
- Figure 1.13: Would you be willing to accept traffic restrictions? ..... 15
- Figure 1.14: Positives of ART..... 17
- Figure 1.15: Why do you think ART would not be good for Aberdeen ..... 17
- Figure 1.16: Gender distribution of respondents ..... 19
- Figure 1.17: Ages of respondents ..... 19
- Figure 1.18: Employment status..... 20
- Figure 1.19: Health ..... 20
- Figure 1.20: Household income ..... 21

This page is intentionally blank

# 1 Market Research

## 1.1 Overview

- 1.1.1 In late November and early December 2022, Stantec commissioned Intellisurvey to undertake 400 panel surveys (300 online and 100 by phone), which sought the public's views on the existing public transport network in Aberdeen and a potential new ART network and services. Approximately 70% of those surveyed were residents of Aberdeen City and 30% were residents of Aberdeenshire.
- 1.1.2 The research first sought to gain views on satisfaction with elements of the existing bus network, before asking people to rate their likelihood of using the bus if these elements (features of the ART network and services) were improved. Information on the respondents' usual mode of transport allowed for an understanding of which elements were more likely to support behavioural change.
- 1.1.3 The research then presented respondents with two approaches to ART:
- The first approach presented was essentially the ART vision (as per Option 5)
  - The second approach presented a reduced approach to ART (as per Option 2)
- 1.1.4 Respondents were asked to rate their likelihood to switch modes under the two approaches.
- 1.1.5 Targeted questions were then posed about certain features of ART including reduced stop spacing and general willingness to accept road space reallocation to public transport.
- 1.1.6 Finally, respondents were asked on whether they thoughts ART would be good for Aberdeen and if so why, or why not.
- 1.1.7 The remainder of this chapter sets out the analysis of the survey responded received.

## 1.2 Where do you live?

- 1.2.1 Survey respondents were asked which local authority they live in and also to provide their four character home postcode sector (e.g., AB10). Figure 1.1 displays the home postcode sectors of the respondents.

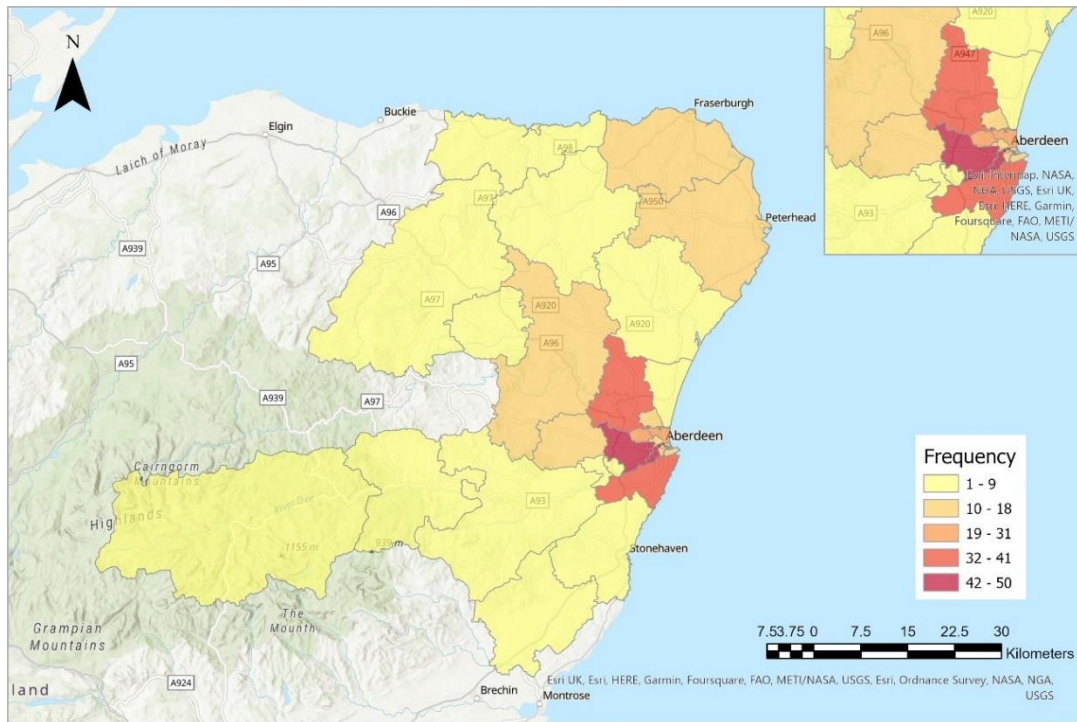


Figure 1.1: Panel survey respondents home postcode districts

1.2.2 The AB10 postcode sector (covering Bridge of Dee, Mannofield and Ruthrieston) received the largest number of public survey responses, with 45 responses recorded. This was followed by AB15 (n = 42), AB21 (n = 33) and AB12 (n = 32).

### 1.3 How often do you generally travel to/from or within Aberdeen?

1.3.1 The survey respondents were asked to select how often they travel to, from or within Aberdeen. Figure 1.2 presents the results. The largest portion (18%) of respondents noted they travel in Aberdeen 7 days a week, followed by those who noted they travelled 5 days a week (16%), then by those who travel once a week (13%).

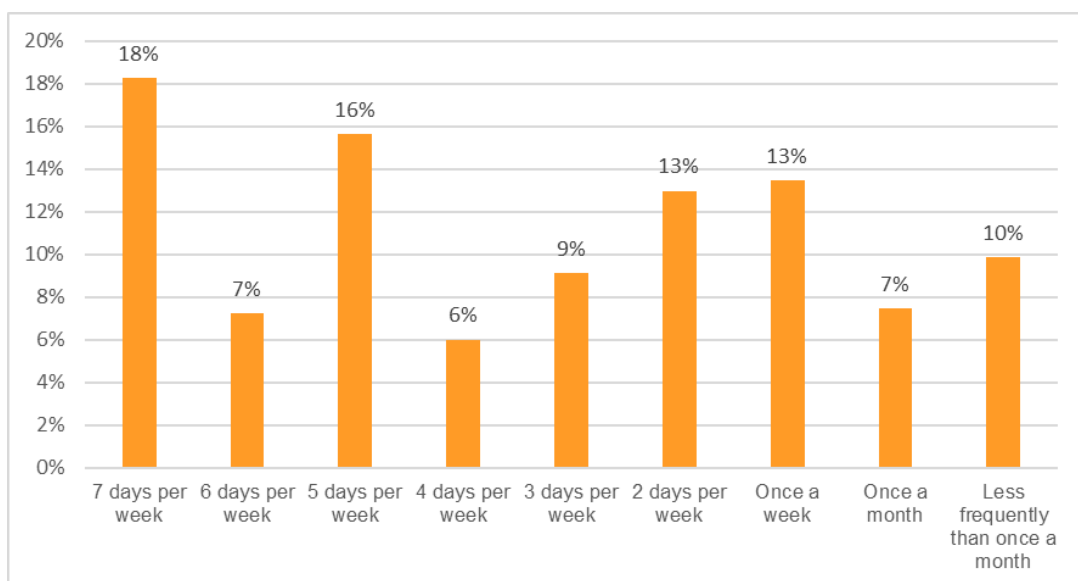


Figure 1.2: Frequency of travel to/from/in Aberdeen

1.3.2 Respondents were then asked to select their normal means of travel for these trips. We have split the responses to show the normal mode of travel for those who live in Aberdeen City and those who live in Aberdeenshire. Figure 1.3 shows the usual mode of transport of respondents from Aberdeen City. 50% of respondents from Aberdeen City selected 'Car/Van', and 24% selected 'Bus'.

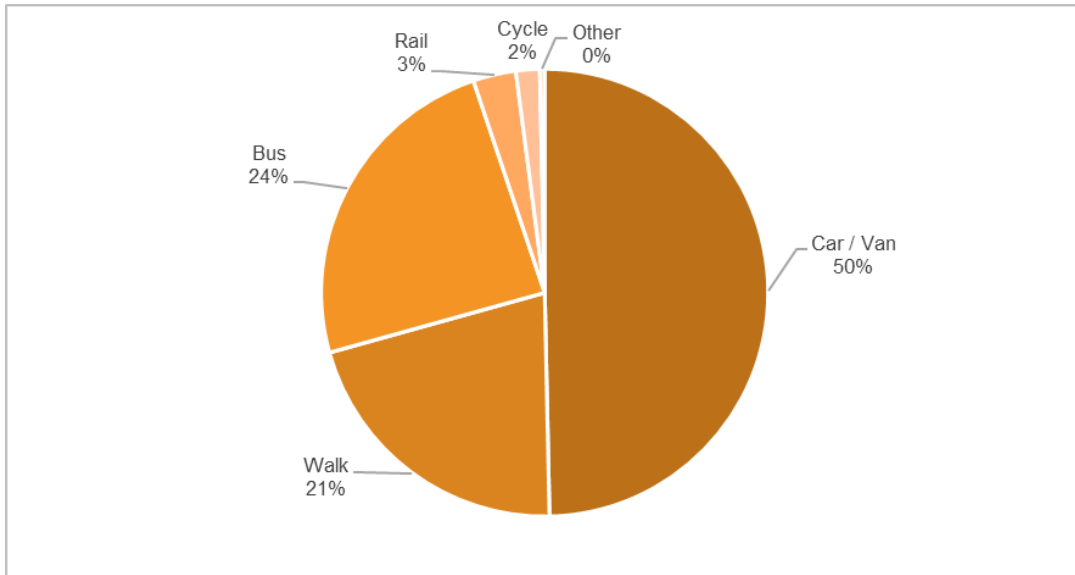


Figure 1.3: Aberdeen City transport modes

1.3.3 Figure 1.4 shows the responses of respondents from Aberdeenshire. Here 72% selected 'Car/Van' as their usual mode of transport, and 17% selected 'Bus'.

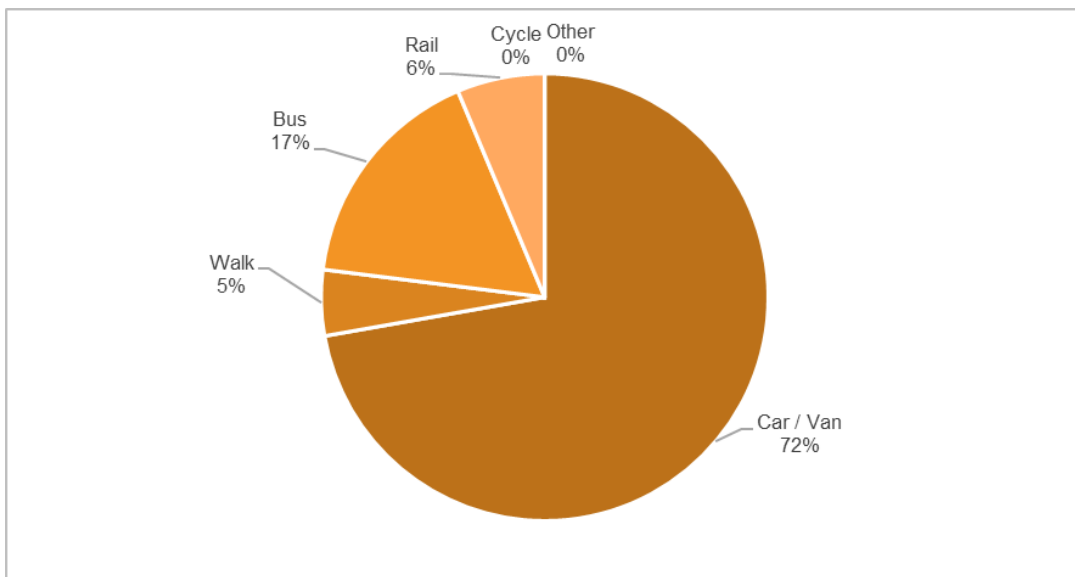


Figure 1.4: Aberdeenshire transport modes

1.3.4 Respondents from both Aberdeen City and Aberdeenshire who noted that they normally travel by car/van were then asked where they usually park and how difficult they usually find it to park there. The results are shown in Figure 1.5.

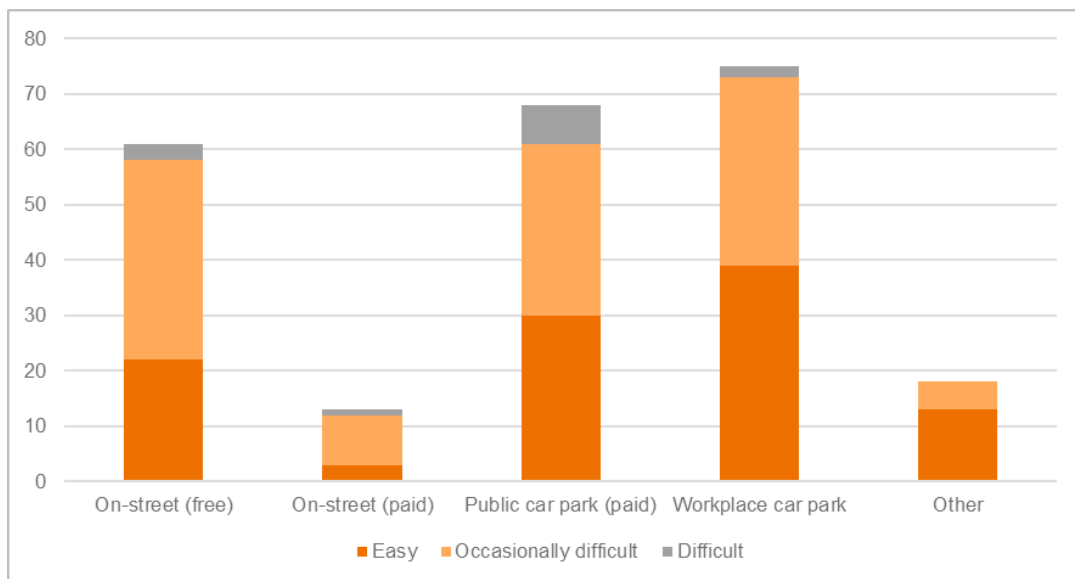


Figure 1.5: Parking difficulty

- 1.3.5 Most respondents parked in a workplace car park (35%), then Public car park (29%), then on street parking (32%). Overall, 46% of respondents find it easy to park in their usual location, while 49% find it occasionally difficult, and 5% find it difficult.

## 1.4 How happy are you with the existing bus network?

- 1.4.1 Respondents were asked to score various statements about the safety, reliability, and facilities of the existing bus network, to provide information on which aspects of the existing bus network are considered to be operating well or poorly. Scoring was between 1 – 5, where 5 is “Very satisfied” and 1 is “Very dissatisfied”.
- 1.4.2 Based on the ranking by each respondent, the options were then allocated a score between 1 and 5 points based on how satisfied the respondent was (i.e., 5 points for “Very satisfied”, decreasing to 1 point for “Very dissatisfied”). The scores awarded by all responses were then totalled to provide an overall option score. The results can be seen in Figure 1.6.



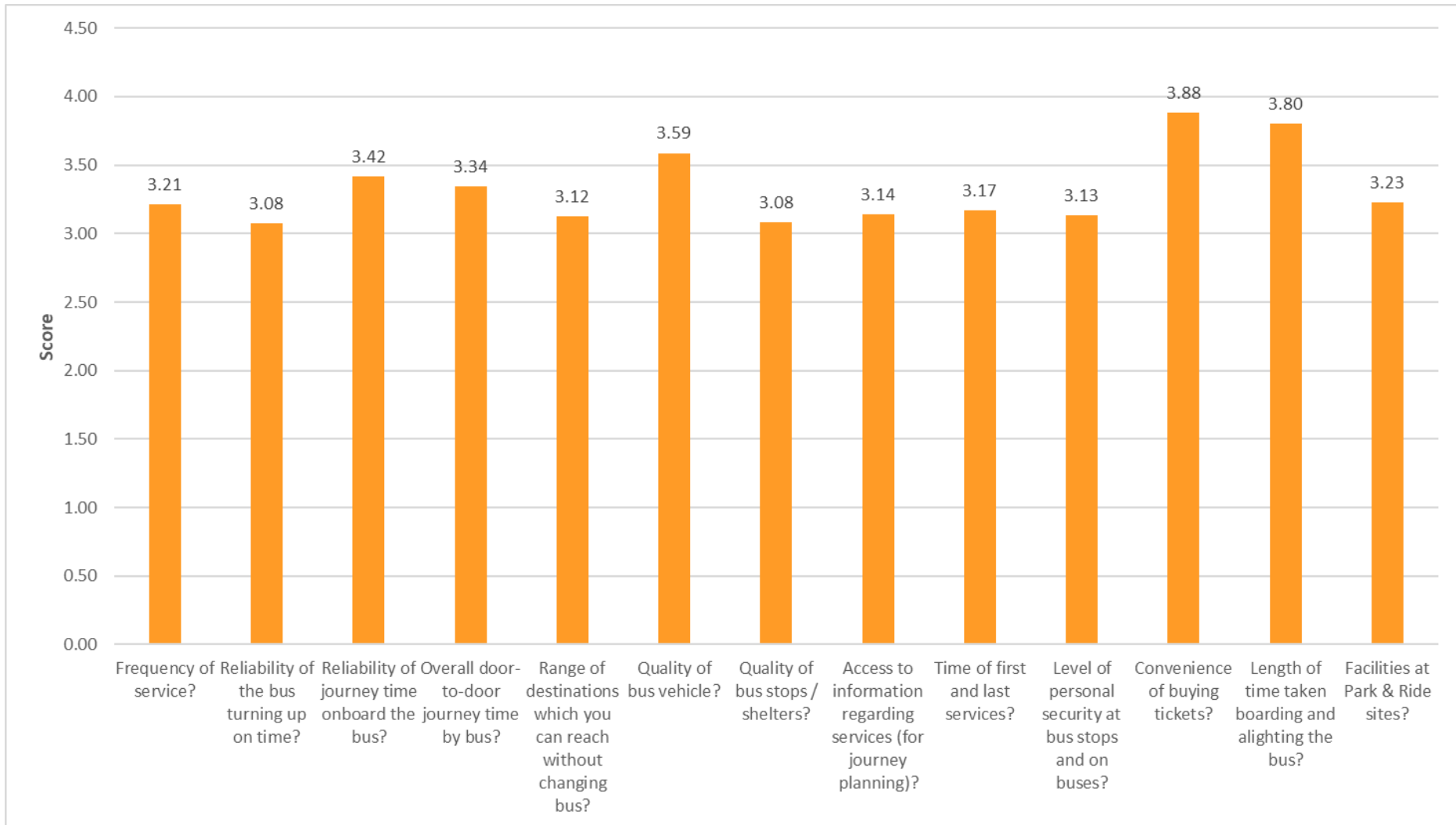


Figure 1.6: Satisfaction with existing bus service offering (Score out of 5)

- 1.4.3 Most questions scored an average of approximately 3. “Convenience of buying tickets” scored highest with an average score of 3.88, followed by “Length of time taken boarding and alighting the bus” (3.80). The lowest scores were “Reliability of the bus turning up on time” and “Quality of bus stops / shelters”, with both statements having an average score of 3.08.
- 1.4.4 Respondents were then asked to score another similar set of statements based on how likely they would be to switch from their current usual mode of transport to using public transport if they were improved/implemented. They were asked to score the statements from 1 – 5, where 5 is “Would definitely start using the bus or use the bus more often” and 1 is “Wouldn't change behaviour”.

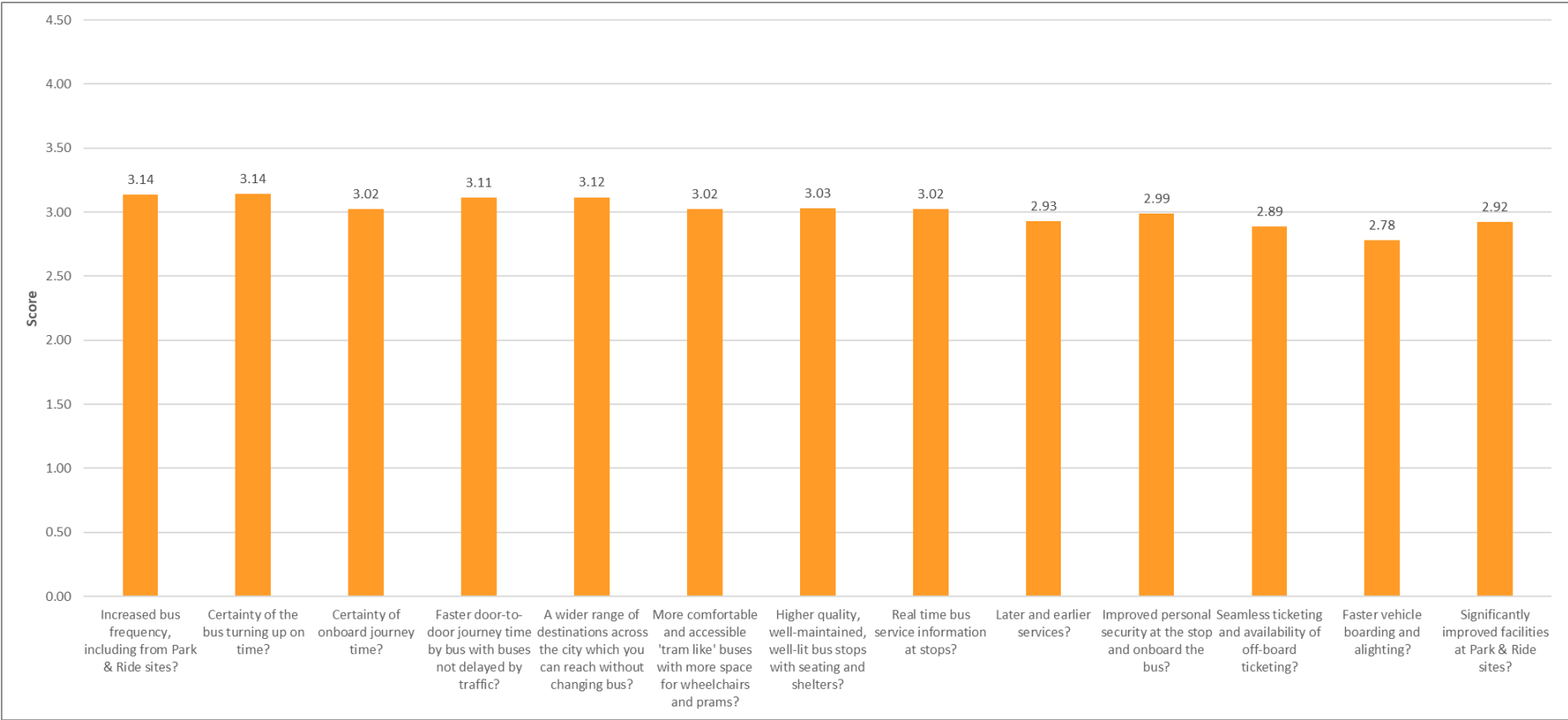


Figure 1.7: Likelihood of behaviour changes based on service improvements (Score out of five)

- 1.4.5 The options were then allocated a score between 1 and 5 points based on how satisfied the respondent was (i.e., 5 points for “Would definitely start using the bus or use the bus more often”, decreasing to 1 point for “Wouldn’t change behaviour”). The scores awarded by all responses were then averaged to provide an overall option score.
- 1.4.6 Most possible service improvements received a score around 3. Respondents noted they would be most likely to switch to using buses if there was “increased bus frequency, including from Park & Ride sites” with an average score of 3.14 and “certainty of the bus turning up on time” with an average score of 3.14. Respondents noted they were less likely to change their current mode of transport as a consequence of “faster vehicle boarding and alighting”, which had an average score of 2.78.

## **1.5 How likely are you to switch to using ART services?**

- 1.5.1 Respondents were asked if they would consider switching from their current usual mode of transport to the new ART services under Approach 1 and 2.
- 1.5.2 Approach 1 comprises the below and is most similar to Option 5:
- Bus lanes and bus priority at junctions ensuring segregation from general traffic and congestion.
  - Faster and more reliable bus journeys.
  - ‘Turn up and go’ bus frequencies with a bus at least every 10 minutes.
  - New cross city services, providing new connections to the Park & Ride sites.
  - New ‘tram style’ multi-door low emission vehicles.
  - New stops with safe, secure, and comfortable waiting environments.
- 1.5.3 Approach 2 is most similar to Option 2, and includes:
- Bus lanes and bus priority at junctions ensuring segregation from general traffic and congestion.
  - Faster and more reliable bus journeys.
  - ‘Turn up and go’ bus frequencies with a bus at least every 10 minutes.
- 1.5.4 Figure 1.8 compares the likelihood of behaviour change under Approach 1 (Option 5) and Approach 2 (Option 2).

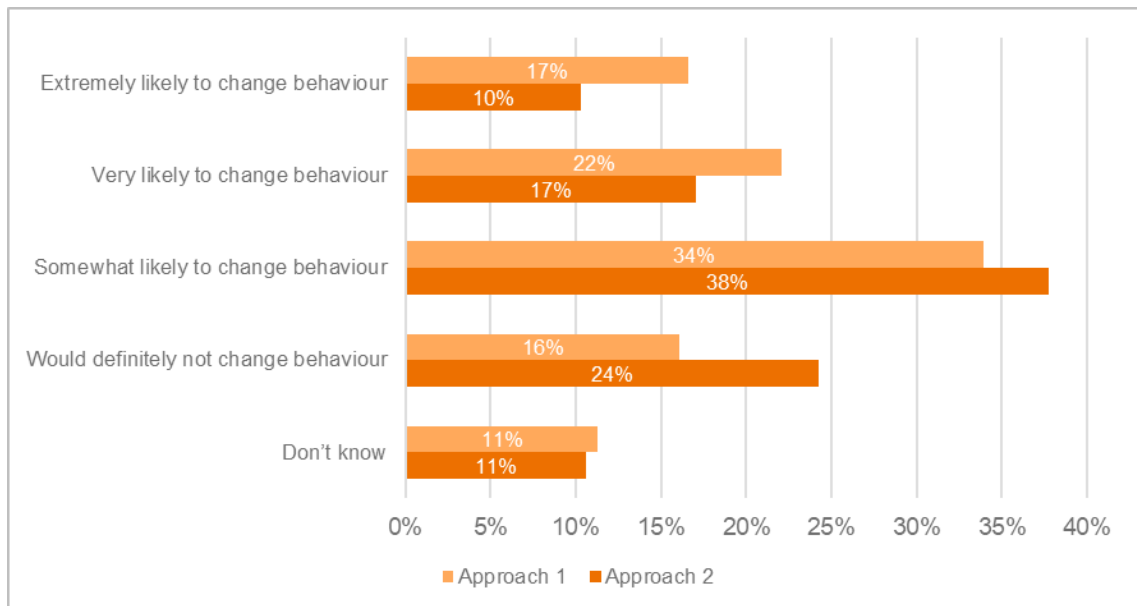


Figure 1.8: Likelihood of behaviour change

1.5.5 A new Park and Ride site is proposed at Portlethen under all options, and so specific consideration has been given to the views of those who currently drive to Aberdeen and live in the AB12, AB30, and AB39 postcode areas to the south of Portlethen (i.e., the most likely users of a new Park and Ride site at Portlethen). Of those who frequently drive in/around Aberdeen from these postcodes. Figure 1.9 shows the responses of those from the AB12, AB30, and AB39 postcode areas. 62% responded that they were ‘Somewhat likely...’, ‘Very likely...’, or ‘Extremely likely’ to change their behaviour under Approach 1, and 44% said the same of Approach 2.

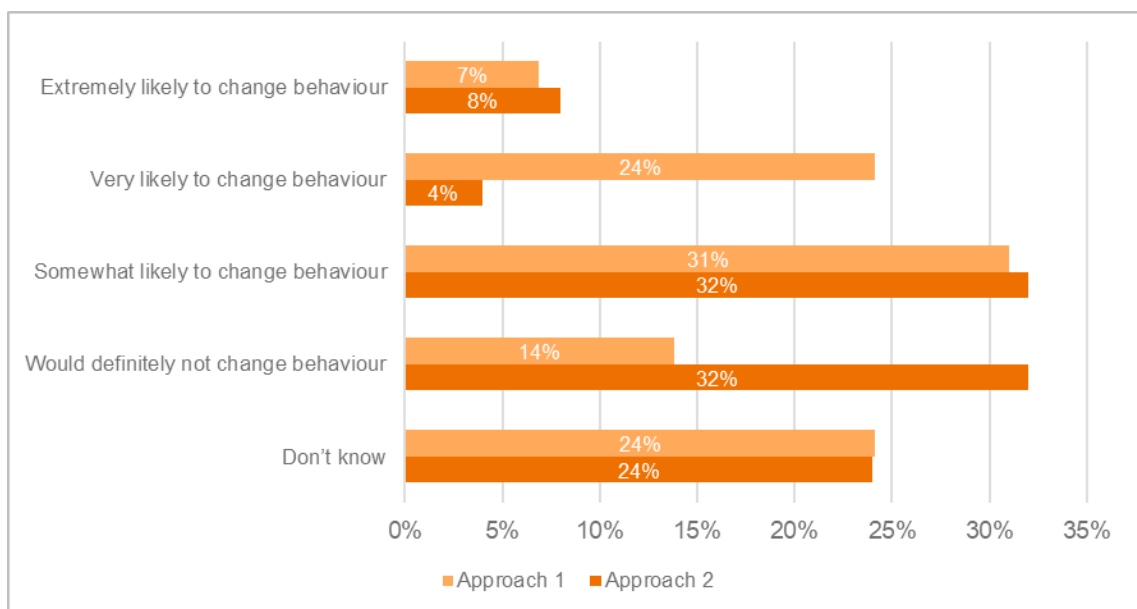


Figure 1.9: Likelihood of behaviour change of these near Portlethen

1.5.6 All respondents who indicated that they were likely to change their travel habits were also asked whether they would travel by bus for their whole journey, or would you use one of the Park & Ride sites.

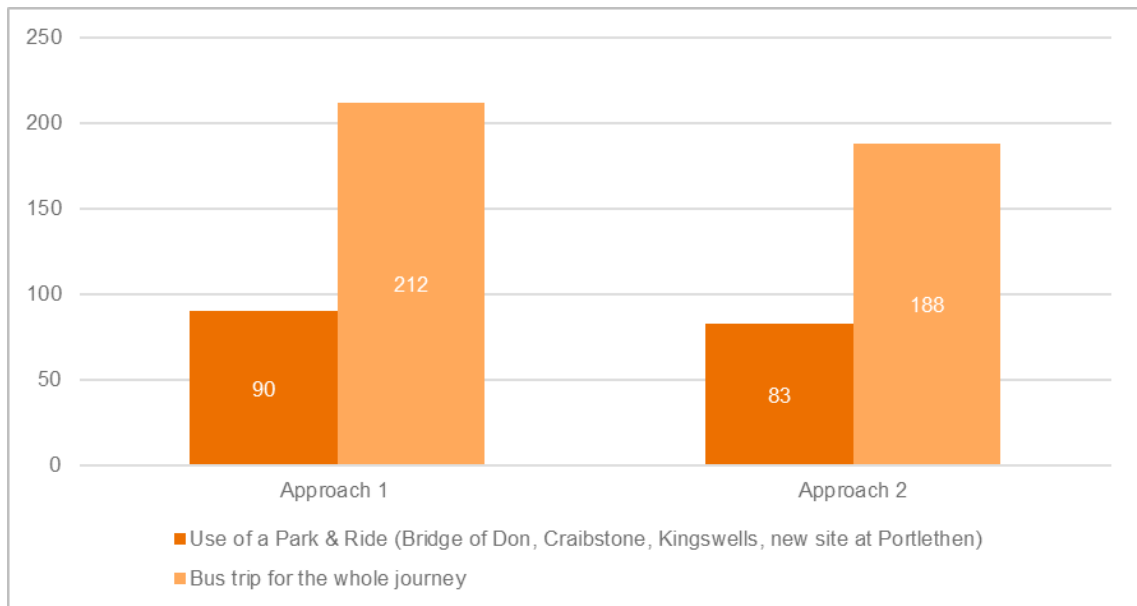


Figure 1.10: Respondents who would choose to use P&R or bus

1.5.7 Of those willing to change their travel habits if either Approach 1 or Approach 2 were implemented, approximately 30% said that they would use a Park and Ride site.

## 1.6 Would you be willing...?

1.6.1 Some of the key issues identified with regard to public transport in Aberdeen relate to journey times, bus service reliability and comfort/safety. ART has the potential to address these issues, but a trade-off will be required and so respondents were asked a series of 'would you be willing...' questions were asked to identify where users were willing to accept that trade-off.

1.6.2 Respondents were first asked "would you be willing to walk or wheel slightly further to an ART bus stop if a sheltered, comfortable and safer waiting environment was provided at the bus stop?". Figure 1.11 illustrates that 33% of respondents would be willing to walk further to a high quality stop, and 37% may be willing to do so.

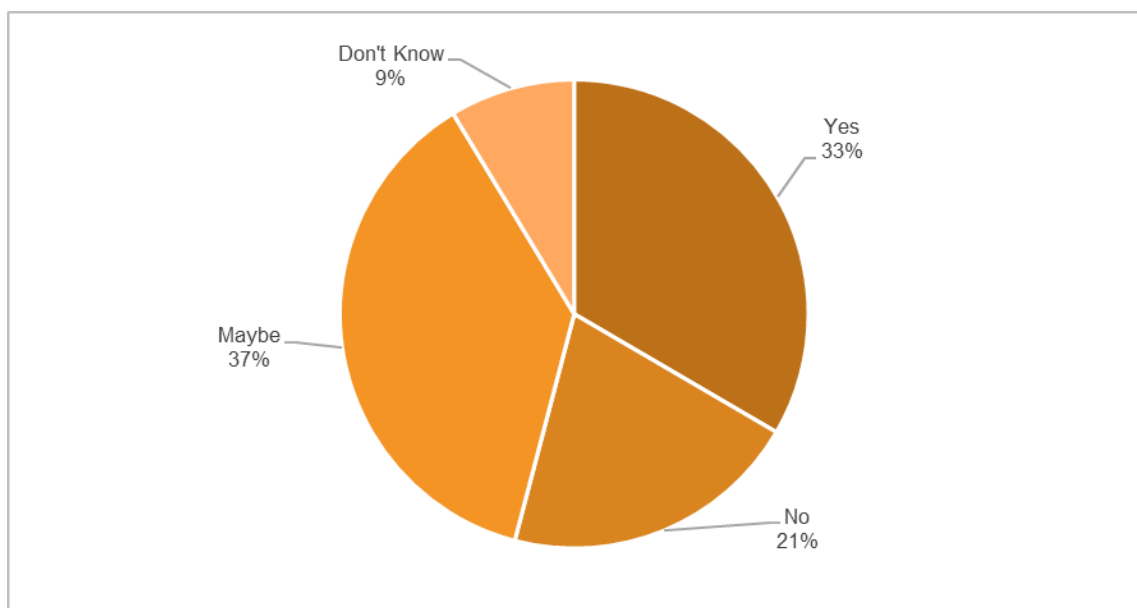


Figure 1.11: Would you travel further for a comfortable environment?

1.6.3 Respondents were also asked if they would be willing to walk or wheel slightly further to an ART bus stop if it meant catching a faster bus, resulting in a shorter door to door journey time. Figure 1.12 shows the results. 43% of respondents said that they would be willing to do so and 29% that they might be.

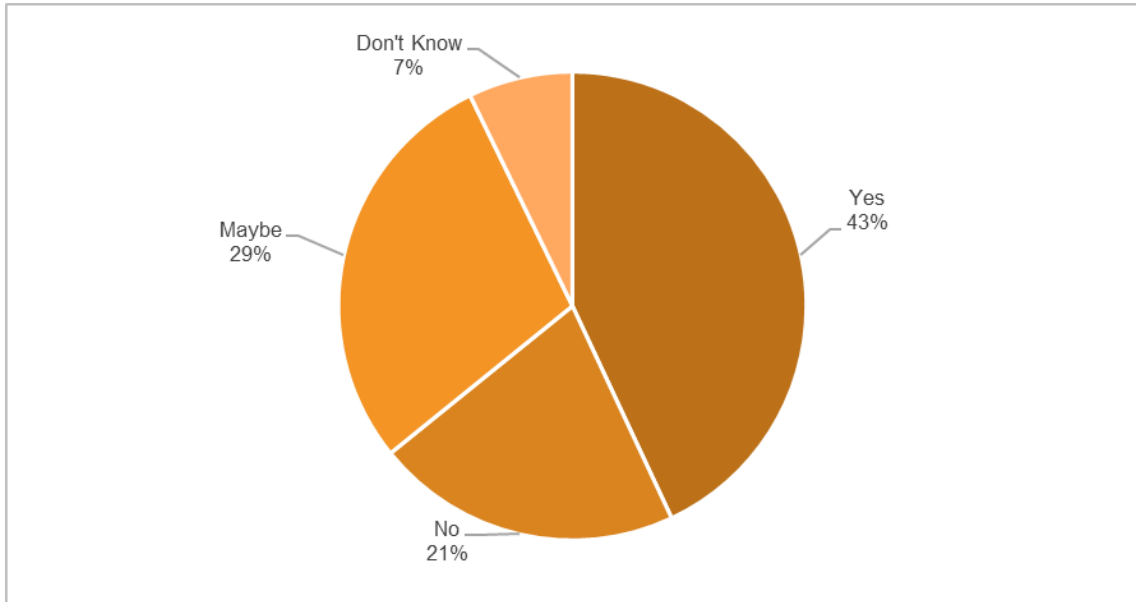


Figure 1.12: Would you be willing to walk further for a faster bus?

1.6.4 Finally, respondents were asked if they would be willing to accept that general traffic on the main roads where ART services would operate would need to be more restricted to achieve service journey time and reliability improvements. 39% of respondents said that they would be willing to accept further restrictions on general road traffic if that would enable faster and more reliable bus services. 27% said that they may be willing to accept this.

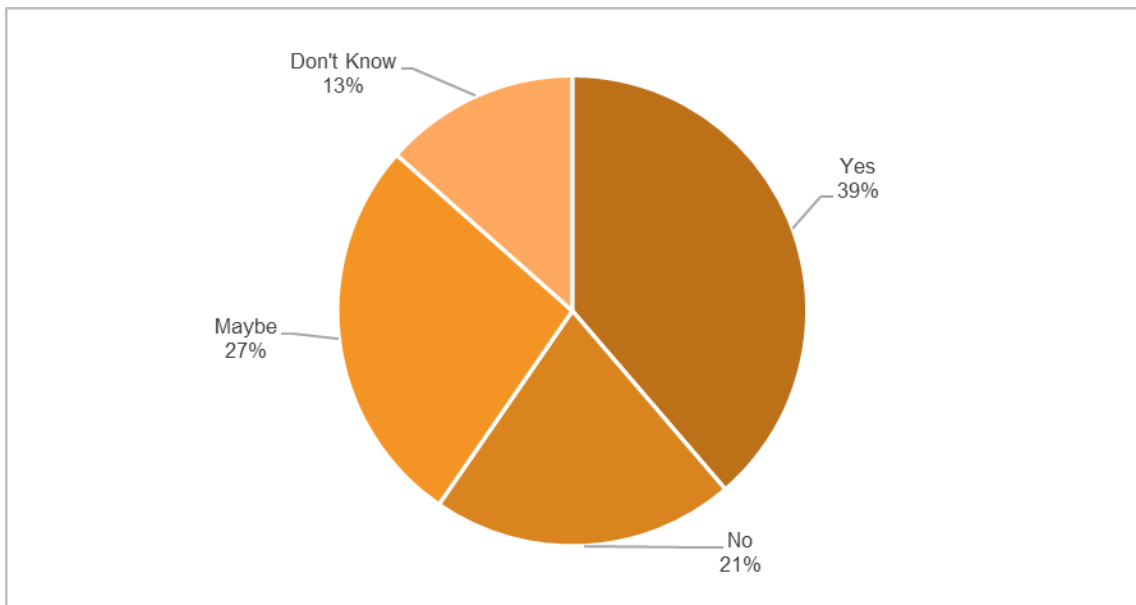


Figure 1.13: Would you be willing to accept traffic restrictions?

1.6.5 Of the three 'would you be willing...' trade-off questions posed, there was greatest support for walking further to a bus stop in exchange for shorter journey times.

## **1.7 In general, do you feel that ART would be good for Aberdeen?**

1.7.1 Respondents were asked if they felt ART would be good for Aberdeen. Across the full sample 58% said 'Yes', 22% said 'Maybe', 10% said 'Don't Know', and 9% responded 'No'. Interestingly, those who identified 'Bus' as their usual means of travel answered similarly to the rest of the survey, with 56% of those who already use buses being in favour of ART, and 9% being against it.

## **1.8 Why do you think ART would be good for Aberdeen?**

1.8.1 The respondents who said that they thought ART would or may be good for Aberdeen were then asked if they thought ART would:

- Reduce congestion?
- Improve road safety?
- Reduce carbon emissions?
- Support economic growth (jobs and employment)?
- Support new housing developments that are less car dependent?
- Help to revitalise the city centre/support the City Centre Masterplan?
- Improve the P&R sites?
- Improve access to the Hospital and Airport?
- Be a good news story?

1.8.2 Respondents had a choice of five answers which were scored as below:

- Yes, definitely (+ 2 points)
- Yes, probably (+1 point)
- Don't know (0 points)
- No, probably not (-1 point)
- No, definitely not (-2 points)

1.8.3 Scores were totalled for each possible answer and results are illustrated in Figure 1.14 below.



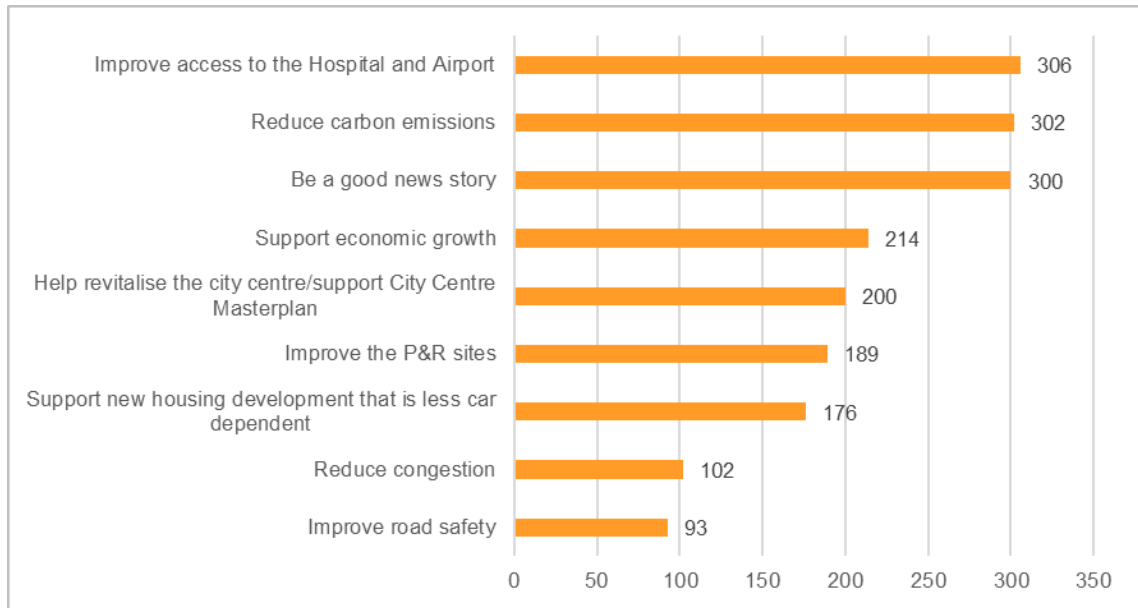


Figure 1.14: Positives of ART

1.8.4 The highest scoring responses were that ART would improve access to the hospital and airport, would help to reduce carbon emissions and be a good news story for the city.

## 1.9 What is the main reason you think ART would not be good for Aberdeen?

1.9.1 Respondents who responded 'No' when asked if they thought ART would be good for Aberdeen were asked for the reason, they thought ART would not be good for Aberdeen. Figure 1.15: Why do you think ART would not be good for Aberdeen presents the results. 46% of those opposed to ART noted that they thought ART would make driving in the city more difficult, 21% thought there was no need for more buses, and 15% that ART was a waste of money.

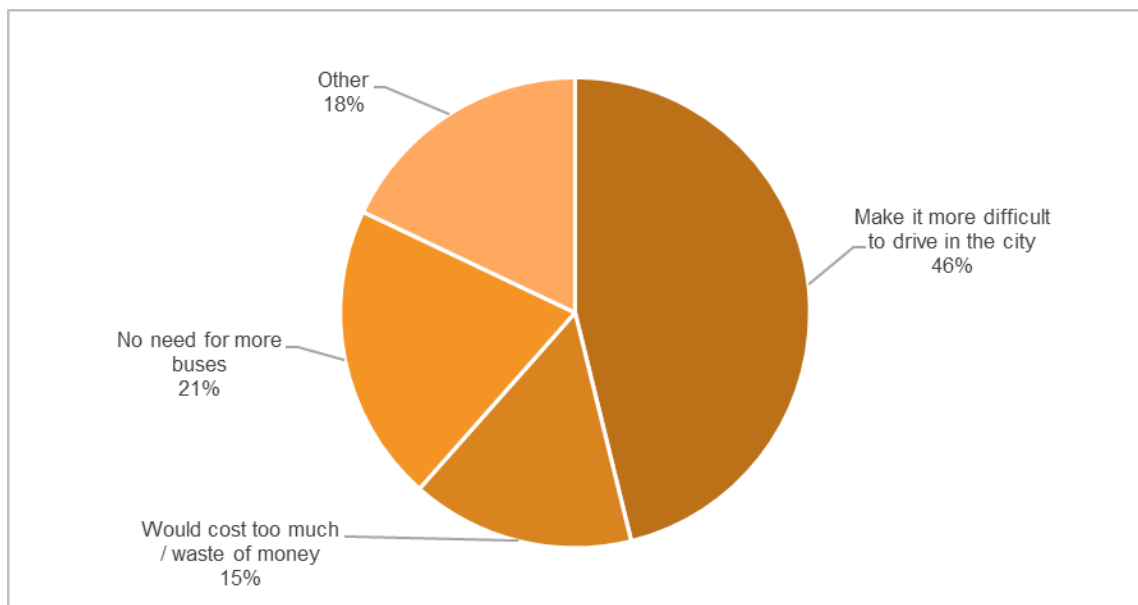


Figure 1.15: Why do you think ART would not be good for Aberdeen

- 1.9.2 19 respondents said that they were opposed to ART for Other reasons. The most common answer given was that they ‘Don’t know’ or don’t have enough information to believe it would be successful (n=10). Some of the other responses included concerns about ART causing delays to general traffic which put people off visiting the city centre, which is already struggling economically (n=3), and concerns that the system won’t work as intended for one reason or another (n=6).

## 1.10 Open Question

- 1.10.1 Those who responded to the survey were provided an opportunity to comment further on the outlined proposals. This was an open question and respondents were not restricted in terms of the content or format of their answer. In total 40 respondents provided a response to the open question. Their responses were grouped into categories and are summarised below:

- 15 respondents commented they support ART and think it would be good for Aberdeen. One of these respondents noted they thought it would improve safety at stops, and another noted if ART was implemented, they would use the bus more.
- Eight respondents voiced concerns about existing bus services, stating that current buses are often late, and don’t stop as often as they used to.
- Five respondents had concerns about accessibility. One respondent noted the distance between stops is currently too large, so they did not support increasing the distance further between stops. Another mentioned having difficulty with ramps to get on current bus services so would like to see that improved with ART buses.
- Four respondents thought cost of using public transport is currently too high for the services offered and is putting people off using public transport, so for ART to be viable it would need to offer an improved service for the price.
- Three respondents voiced concerns that restricting car use in Aberdeen city centre would have a knock-on effect on car use in Aberdeenshire, where residents would not have easy access ART services. Several respondents noted that reducing car traffic in the city centre would make it more difficult for those in Aberdeenshire who need their cars to get to work.
- Three respondents noted that facilities at current bus stops are insufficient, and they do not use the bus as they feel unsafe. These respondents noted if the stops had improved lighting and CCTV, they would be more likely to use public transport. One respondent also noted they would be more likely to use the bus if secure bike parking facilities were provided.
- Two respondents noted they required more information to come to a conclusion if ART would be good for Aberdeen or not.

## 1.11 Demographics

- 1.11.1 Respondents were asked a series of questions relating to the individual’s gender, age, employment, illness/health condition (which impacts personal mobility) and income.

### Gender identity

- 1.11.2 Respondents were asked which gender they identify with. Figure 1.16 displays the results. 52% of respondents identified as female, 48% as male. Note that 1 respondent identified “In another way”, although due to the volume of respondents, this represents close to 0%.

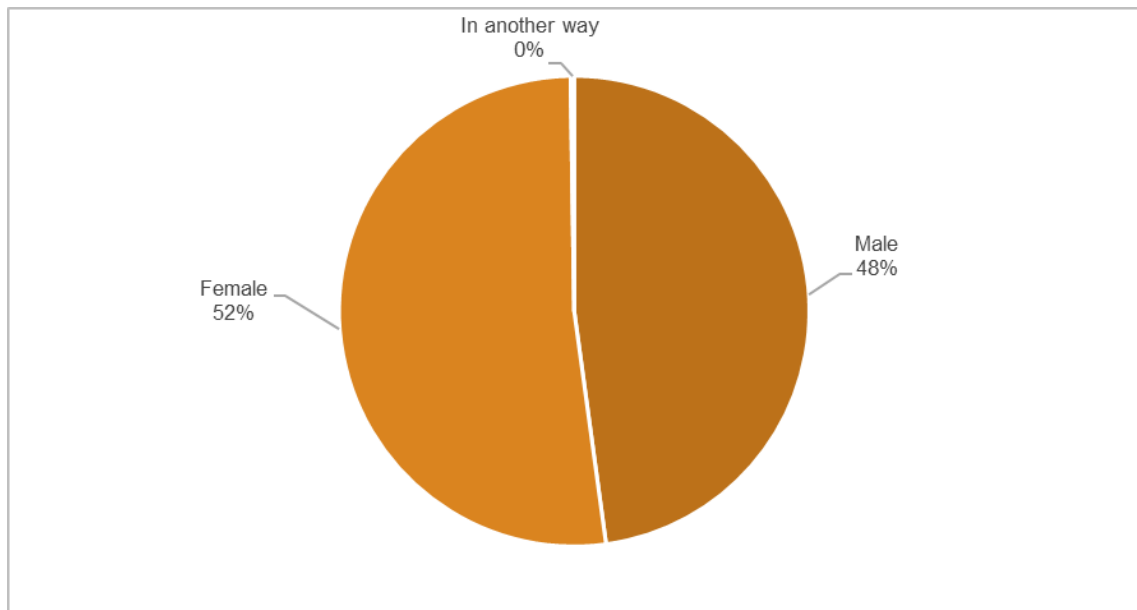


Figure 1.16: Gender distribution of respondents

### Age

1.11.3 Figure 1.17 presents the age distribution of respondents. The largest number of responses were received from those in the 25-34 age group (17%) and the 35-44 age group (17%), followed by 55-64 (16%) and then 16-24 (14%) and 45-54 (14%).

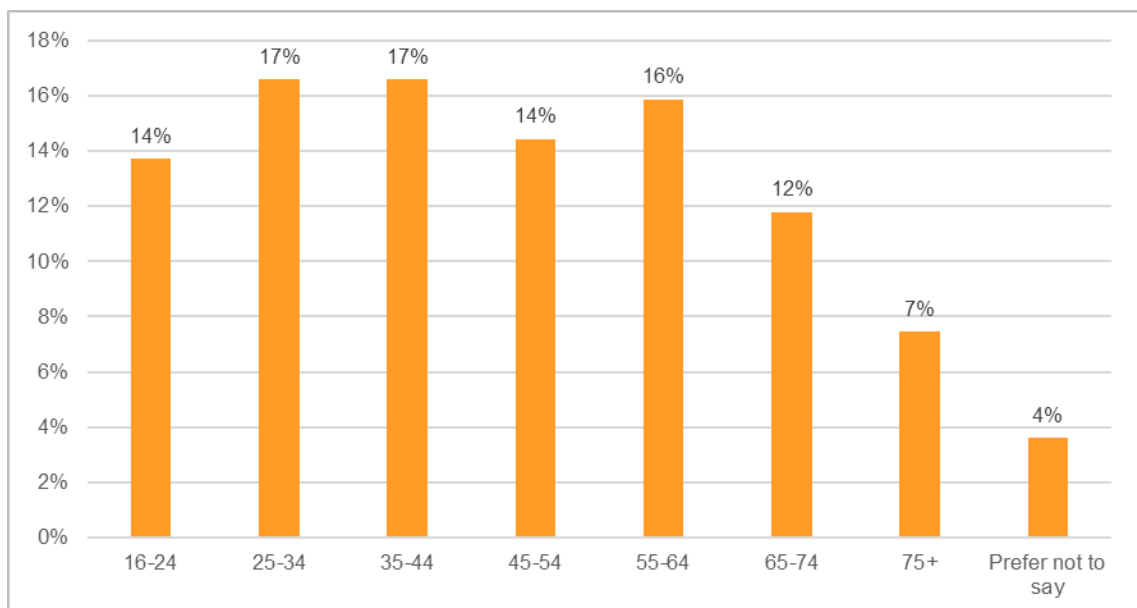


Figure 1.17: Ages of respondents

1.11.4 Population data for Aberdeen City indicates that in 2021 78% of the adult population was aged 16-64, which falls very closely in line with the above (78%) and indicates a good age representation within the survey sample.

### Employment status

1.11.5 Figure 1.18 presents the status of employment of respondents. 45% of respondents are employed full time, 22% are retired, and 14% are employed part-time. Data from the Scottish

Government indicates that in Autumn 2021, 69% of those aged 16+ were economically active, compared with approximately 54% of survey respondents.

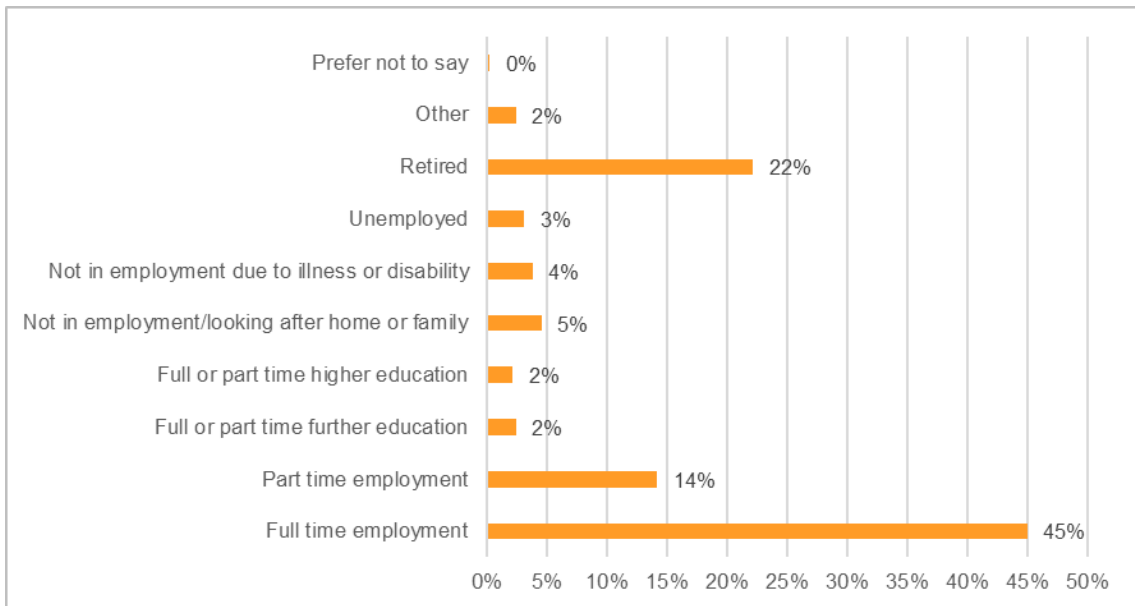


Figure 1.18: Employment status

### Health

1.11.6 Respondents were asked if they have a physical or mental health condition that will last or is expected to last more than 12 months, to which 24% responded 'Yes'. Those who responded 'Yes' were then asked if their condition impairs their mobility, 49% selected 'No', 45% selected 'Yes' and 6% selected 'Prefer not to say'.

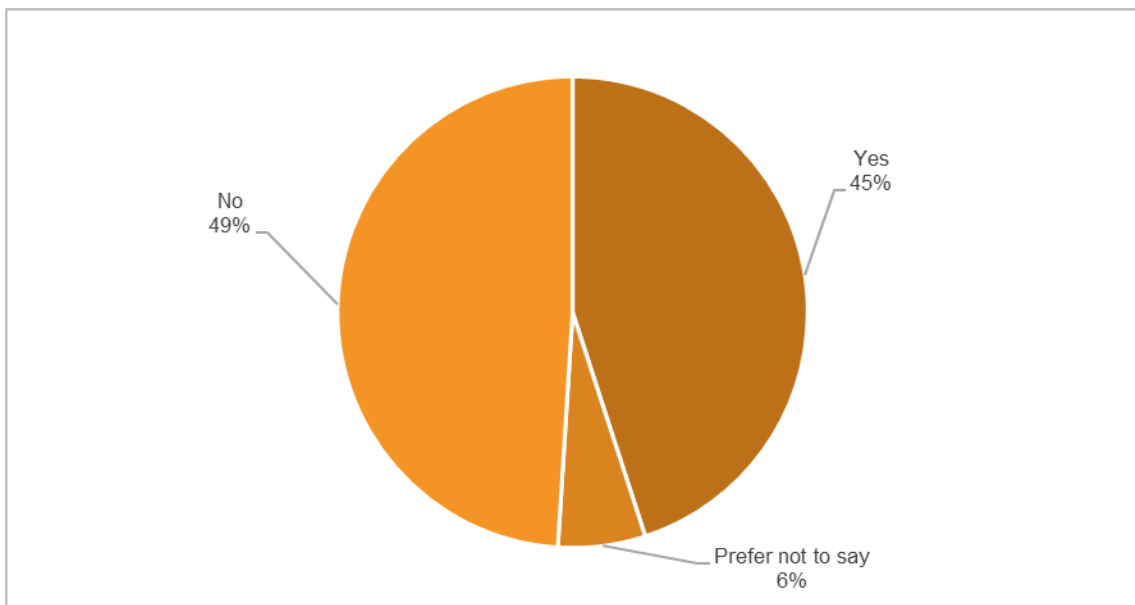


Figure 1.19: Health

### Household income

1.11.7 Figure 1.20 displays the distribution of respondents' reported household annual incomes (before tax). Data from Aberdeenshire Council shows that in 2022 the average household

income in Aberdeenshire was £40,000 per year, and £33,000 across Scotland. In comparison, 37% of survey respondents come from households earning more than £30,000 and 24% come from households earning more than £40,000.

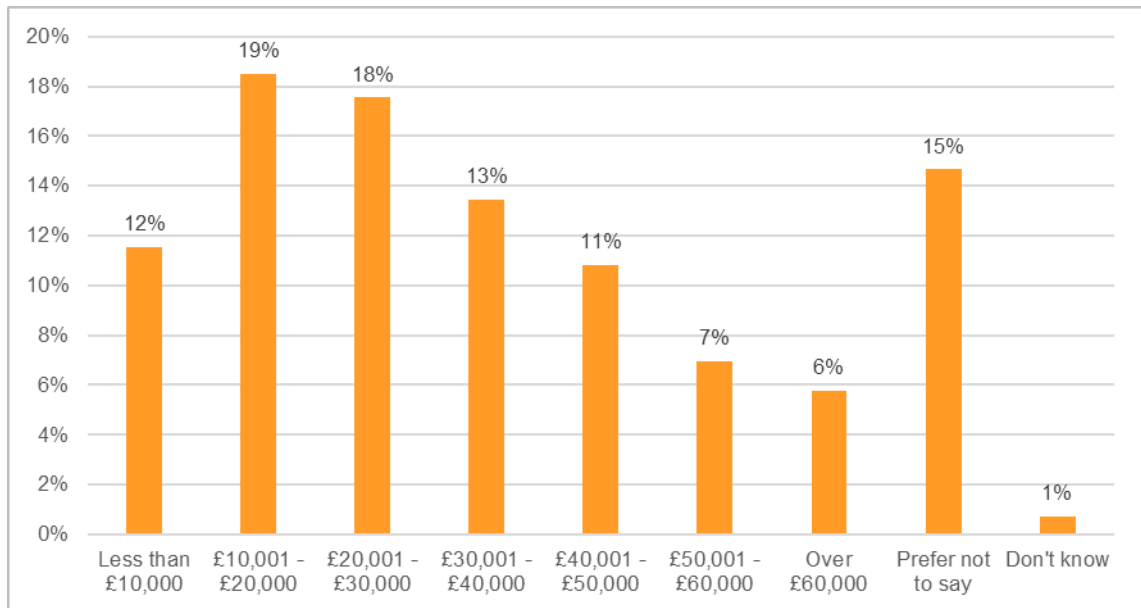


Figure 1.20: Household income